

STATE OF RHODE ISLAND
BOARD OF ELECTIONS
ERTS
USER MANUAL



STATE OF RHODE ISLAND BOARD OF ELECTIONS

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Introduction

The Board of Elections (“BOE”) has produced this manual to assist candidates, officeholders and committees with electronic filing of campaign finance reports via the Electronic Reporting and Tracking System (“ERTS”).

If you have any problems or questions not resolved by this manual, please call a member of the campaign staff at (401) 222-2345; meet with a member of the campaign finance staff in person; or e-mail the Board at campaignfinance@elections.ri.gov.

NOTICE

Recordkeeping Requirement ***R.I.G.L 17-25-11.1***

It is required that you keep and maintain all receipts, records, and supporting documentation of all transactions for 4 years. ERTS is not intended as a proof of transaction should you need it for auditing or other purposes.

It is highly recommended that when you file a report through ERTS you click the “*Click here to view report*” option and print a paper copy of your filing for your own records.

Getting Around in ERTS

Whenever you login to ERTS you will start at the *Organization Overview* screen seen below:

Click on the "Help with this page" link to access instructions about the page.

Your campaign name will be displayed here

Your last login date is displayed here

Log off

Navigation Tabs

Organization Overview

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: May 13 2005 10:08AM
[Log Off](#) | v 5.2 (stage)

Navigation Tabs: Overview | Contributions | Expenditures | Filings | Reports | Admin

Account Status

Totals	
Ending Balance as of 03/31/2005	\$870.23
Pending Contributions	\$0.00
Pending Expenditures	\$0.00

Transaction History

Transaction Type	Year to Date Totals
Contributions	\$1,646.00
Expenditures	\$974.77

Reports Due

Report Type	Due Date	Report Status	Date Filed	
2005 On-Going Quarterly (2nd)	07/30/2005			File
2005 On-Going Quarterly (3rd)	10/30/2005			File
2005 On-Going Quarterly (4th)	01/30/2006			File

Board Actions (Fines and Violations)

Description	Violation Date	Violation Description	Violation Balance
Open	10/05/2004	Late Filing Violation	\$25.00
Open	11/30/2004	Late Filing Violation	\$49.00

Reports due, as scheduled by the BOE, are displayed here

A report not filed by its Due Date will have a **Past Due** Report Status.

Screenshot 1 - Organization Overview

Navigation Tabs (Figure 1)

The *Navigation Tabs* are the primary way to access most areas within ERTS. From the Navigation Tabs you may access key areas of ERTS.

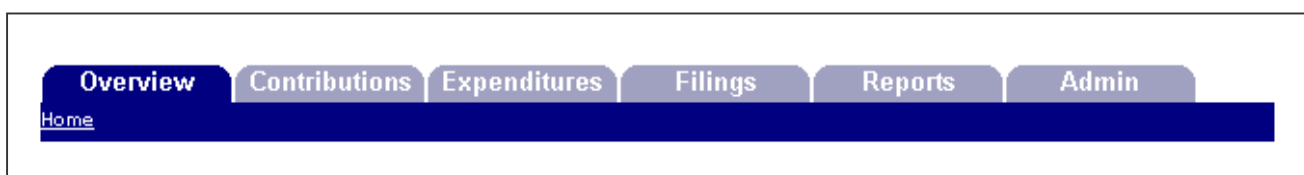







Fig. 1 – Navigation Tabs

Navigation Buttons

	Use this button to return to the previous screen. It is recommended that you use this button instead of the Back button on your Web browser.
	Use to add a new contribution or expenditure
	Use to find a contribution or expenditure that you have already submitted.
	Use to search for an existing donor from a contribution or an existing payee from expenditure.
	Use to submit information to ERTS.

Organization Overview Page

Every user begins in the Organization Overview area. There are four main sections of the Overview area:

Account Status (see Screenshot 2)

Information contained in this section includes:

- **Ending Cash Balance:** the ending cash balance of the most recent report received by the BOE.
- **Pending Contributions:** total contributions entered into ERTS, but whose scheduled report has not been filed.
- **Pending Expenditures:** the total expenditures entered into ERTS, but whose schedule report has not been filed.

Transaction History (see Screenshot 2)

Information in this section includes:

- **Contributions:** the total of all contributions entered into ERTS for reports that have been "Received by the BOE" during the calendar year.
- **Expenditures:** the total of all expenditures entered into ERTS for reports that have been "Received by the BOE" during the calendar year.

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Organization Overview

Welcome back: JOHN Q CANDIDATE Last Login: Apr 14 2005 8:28AM
[Help with this page](#) [Log Off](#) | v1.5.2 (stage)

Account Status

Totals	
Ending Balance as of 12/31/2004	\$0.00
Pending Contributions	\$0.00
Pending Expenditures	\$0.00

Transaction History

Transaction Type	Year to Date Totals
Contributions	\$0.00
Expenditures	\$0.00

Reports Due

Report Type	Due Date	Report Status	Date Filed	
2005 On-Going Quarterly (1st)	04/30/2005			File
2005 On-Going Quarterly (2nd)	07/30/2005			File
2005 On-Going Quarterly (3rd)	10/30/2005			File
2005 On-Going Quarterly (4th)	01/30/2006			File

Labels on the right side of the screenshot:

- Account Status Section
- Totals
- Transaction History Section
- YTD Totals

Screenshot 2 – Organization Overview

Organization Overview

Welcome back: JOHN Q CANDIDATE Last Login: Apr 15 2005 8:19AM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Overview Contributions Expenditures Filings Reports Admin

Account Status

Totals	
Ending Balance as of 12/31/2004	\$0.00
Pending Contributions	\$1,345.00
Pending Expenditures	\$974.77

Transaction History

Transaction Type	Year to Date Totals
Contributions	\$0.00
Expenditures	\$0.00

Reports Due

Report Type	Due Date	Report Status	Date Filed	
2005 On-Going Quarterly (1st)	04/30/2005			File
2005 On-Going Quarterly (2nd)	07/30/2005			File
2005 On-Going Quarterly (3rd)	10/30/2005			File
2005 On-Going Quarterly (4th)	01/30/2006			File

Board Actions (Fines and Violations)

Description	Violation Date	Violation Description	Violation Balance
Open	10/05/2004	Late Filing Violation	\$25.00
Open	11/30/2004	Late Filing Violation	\$49.00

Annotations:

- Reports Due Section:** Points to the Reports Due table.
- Report Type:** Points to the Report Type column in the Reports Due table.
- Violation Date:** Points to the Violation Date column in the Board Actions table.
- Violation Description:** Points to the Violation Description column in the Board Actions table.
- Report Due Date:** Points to the Due Date column in the Reports Due table.
- Fine Amounts:** Points to the Violation Balance column in the Board Actions table.

Screenshot 3 – Organization Overview

Reports Due (see Screenshot 3)

Information in this section includes:

- **Report Type:** reports scheduled by the BOE
- **Due Date:** the date by which a report must be filed through ERTS.
- **Report Status:** indicates whether the report is past due or rejected.
- **Date Filed:** this field is blank since the report has not been filed.



To view filings received by the BOE, look under the **Filings** tab.

Board Actions (see Fig. 3)

Information in this section includes:

- **Description:** indicates whether a fine or penalty assessed by the BOE is open, paid, revoked or suspended.
- **Violation Date:** the effective date of the BOE action.
- **Violation Description:** a description of the BOE action.
- **Violation Balance:** the current outstanding balance of the fine or penalty.

Contributions

Clicking on the **Contributions** tab brings you to the Contributions section of ERTS. This is where you enter and manage all contributions received by your organization.

Contributions Tab

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)
 Last Login: Apr 15 2005 9:14AM
[Log Off](#) | v 1.5.2 (stage)

Overview **Contributions** Expenditures Filings Reports Admin

Home

Contribution Administration

Contribution History (10 most recent Contributions)

[Add](#) [Find](#)

Donor	Contribution Type	Contribution Date	Deposit Date	Contribution Amount	
MS. LISA K JONES	Individual	03/15/2005		\$300.00	Edit
JOHN Q CANDIDATE	Loan Proceeds	02/15/2005		\$500.00	Edit
	Aggregate - Individual	03/07/2005	03/07/2005	\$370.00	Edit
JANE JONES	Individual	02/19/2005		\$125.00	Edit
MR. JOHN N. SMITH	Individual	01/12/2005		\$50.00	Edit

Donor Maintenance

By entering the Donor Maintenance area, you as the user will have the ability to search for a donor and to fix any information that is stored about the selected donor.

[Update a Donor](#)

Click Here to Enter the Donor Maintenance Section

Add a Contribution

Find Contribution

10 Most Recent Contributions

Edit a Contribution

Done

Internet

Screenshot 4

Contributions History (see Screenshot 4)

This section allows you to view up to the last 10 contributions entered into ERTS, add new contributions and find and edit contributions already entered into ERTS.

- **Donor:** Name of the donor (if applicable).
- **Contribution Type:** The type of contribution received, such as *Individual*, *Party*, *PAC*, etc.
- **Contribution Date:** The date the contribution was received by the duly appointed campaign treasurer or deputy treasurer.
- **Deposit Date:** The date the contribution was deposited into a campaign account.
- **Contribution Amount:** The amount of the contribution.
- **Edit:** The link allows the editing of contribution information for the last 10 contributions entered into ERTS.

Add a New Contribution-General Information (see Screenshot 5)

To add a new contribution into ERTS:

1. click on the **Add** button in the Contributions History section (see Screenshot 4), which brings you to the Contribution Entry page. (see Screenshot 5).
2. locate the "Contribution Type" selection box in the Contribution area and select a contribution type from the drop down list.

Note: The contribution type "Individual" is the default setting in ERTS. (see Screenshot 6) Selecting a different contribution type from the drop down list will cause the page to automatically reload to reflect the relevant and required fields for that particular contribution type.

3. Enter the required Contribution information.
4. Enter the donor's Last Name, PAC name or Party Committee name in the Donor Information area.
5. Click on the **Search** button.
 - a. If Donor Information is already stored in ERTS, select correct name.
 - b. If Donor Information is **not** already stored in ERTS, enter all required Donor Information and Employer Information (if Contribution Type = Individual)

Note: ERTS stores Donor Information for **all** political action committees (PACs) and state and municipal party committees registered in Rhode Island. ERTS stores Donor Information for individual donors to a particular organization once the information is entered initially by said organization.

6. Click **Submit** button to save contribution in ERTS.
7. Repeat steps 1-6 to continue data entry of contributions received.
8. Click on the **Return** button to go back to the Contribution Administration page.

Contribution Type

Contribution Type * Receipt Date (mm/dd/yyyy) * Deposit Date (mm/dd/yyyy) * Transaction Type * Contribution Amount *

Donor Information

Prefix: First Name: * MI: Last Name: * Suffix:

Address1: **

Address2:

City: ** State: ** Zip:

Employer Information

Name: **

Address1: **

Address2:

City: ** State: ** Zip:

Buttons: Submit, Search, Return

Annotations:

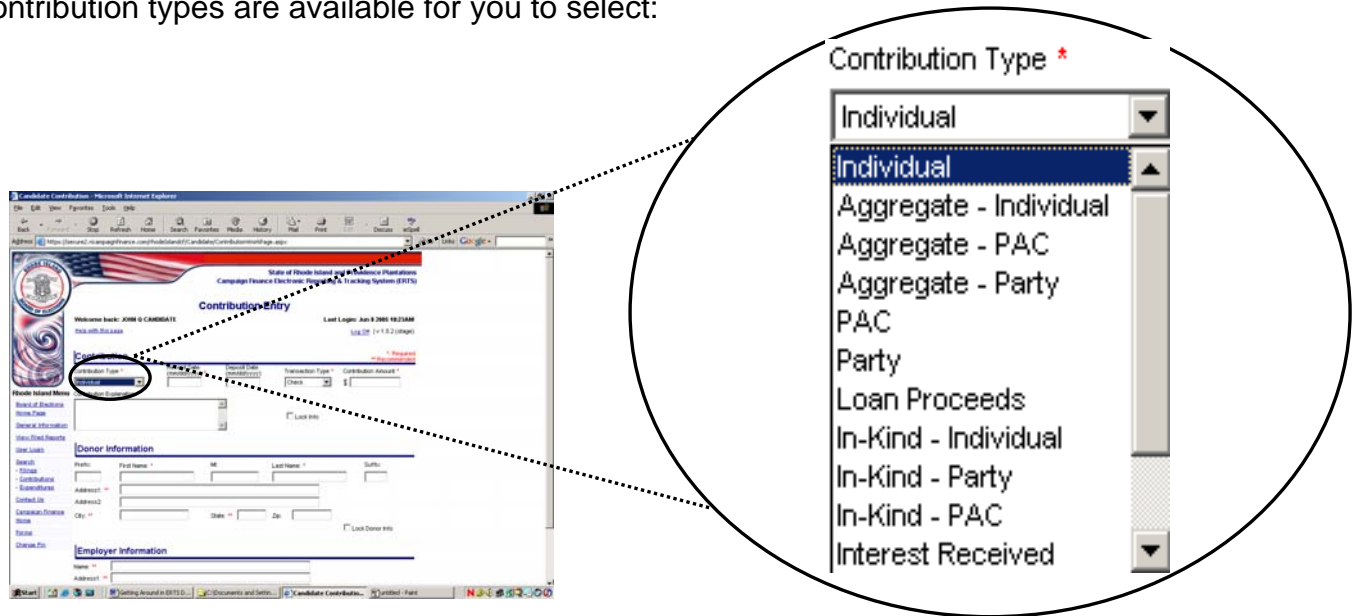
- Click here to save contribution in ERTS (points to Submit button)
- Search for the donor (points to Search button)
- Enter specific information about the contribution here (points to Contribution Amount field)
- Enter required information about the donor here (points to First Name field)
- Enter required information about the donor's employer here (points to Employer Name field)
- Click here to cancel entry of the contribution (points to Return button)

Screenshot 5 - Contribution Entry page

NOTE: It is important that you utilize the “Search” feature whenever adding contributions in order to maintain an accurate donor database and to ensure compliance with annual contribution limits. ERTS has the capability to warn you if a donor exceeds his or her annual contribution limit set by Rhode Island’s campaign finance laws.

Contribution Type (see Screenshot 6)

Before adding a new contribution, you must select the appropriate Contribution Type from the drop down list in the Contribution area of the Contribution Entry page. The following contribution types are available for you to select:



Screenshot 6 – Add a Contribution Screen

*Note, in addition to the selections above, you may also choose **Refund/Rebate**, **Other Receipt**, or **Matching Public Funds** as contribution types (these choices are **not** displayed above).



If you leave a **required** field blank, the contribution will not be accepted. You will receive a warning message in red text indicating which required fields you failed to correctly enter information into.

Donor Maintenance (see Screenshot 7)

To update or add Personal or Employment Information for an individual donor previously entered into ERTS by an organization:

1. Proceed to the **Donor Maintenance** area located under the **Contributions** tab on the **Contribution Administration** page (see Screenshot 7)
2. Click on [Update a Donor](#) link, which brings the user to **Donor/Payee Update** page (see Screenshot 8)

The screenshot shows the 'Contribution Administration' page of the State of Rhode Island Campaign Finance ERTS system. The page has a header with the state seal and the title 'State of Rhode Island and Providence Plantations Campaign Finance Electronic Reporting & Tracking System (ERTS)'. Below the header, there is a navigation bar with tabs: Overview, **Contributions**, Expenditures, Filings, Reports, and Admin. The 'Contributions' tab is selected. The main content area displays 'Contribution History (10 most recent Contributions)' with a table of donor transactions. Below the table, there is a 'Donor Maintenance' section with a link to 'Update a Donor'. Annotations with arrows point to the 'Contribution Administration' header, the 'Contributions' tab, the 'Donor Maintenance' section, and the 'Update a Donor' link.

Contribution Administration page

Contributions tab

Donor Maintenance area

Update a Donor

Contribution History (10 most recent Contributions)

Donor	Contribution Type	Contribution Date	Deposit Date	Contribution Amount	
ROGER WILLIAMS	Individual	02/01/2005		\$300.00	Edit
MS. LISA K JONES	Individual	03/15/2005		\$300.00	Edit
JOHN Q CANDIDATE	Loan Proceeds	02/15/2005		\$500.00	Edit
	Aggregate - Individual	03/07/2005	03/07/2005	\$370.00	Edit
JANE JONES	Individual	02/19/2005		\$125.00	Edit
MR. JOHN N. SMITH	Individual	01/12/2005		\$50.00	Edit

Donor Maintenance

By entering the Donor Maintenance area, you as the user will have the ability to search for a donor and to fix any information that is stored about the selected donor.

[Update a Donor](#)

Screenshot 7-Donor Maintenance

https://secure2.ricampaignfinance.com/rhodeIslandcf/Candidate/ContributionWorkPage.aspx - Microsoft Internet Explorer

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: JOHN Q CANDIDATE
Last Login: Apr 19 2005 12:57PM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Record Type: ☒ Individual ☐ Organization

Personal Information

Prefix First Name MI Last Name Suffix
 JONES

Address1
 Address2

City State Zip

Employer Information

Employer Name
 Employer Address1
 Employer Address2
 Employer City State Employer Zip

[Search](#) [Contribution Home](#)

Click here to search for an existing Donor or Payee.

Screenshot 8 - Donor/Payee Update Page/Search for donor individual

3. Click the appropriate Record Type: Individual or Organization
 - a. For Individual, enter the donor's last name into the Last Name field. (see Screenshot 8)
 - b. For Organization, enter Organization Name. (see Screenshot 9)

https://secure2.ricampaignfinance.com/rhodeIslandcf/Candidate/DonorUpdate.aspx?Page=Contribution - Microsoft Internet Explorer

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE
Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v 1.5.4 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name

Address1
 Address2

City State Zip

[Search](#) [Contribution Home](#)

Screenshot 9-Search for donor organization

4. Click **Search**.

- For Record Type: Individual, the names of all individual donors previously entered into ERTS by the user's organization will be searched and any matches will be displayed in the Search Results area. (see **Screenshot 10**).
- For Record Type: Organization, the names of all organization payees (i.e. for Interest Received and Refunds/Rebates) previously entered into ERTS by the user's organization will be searched and any matches will be displayed in the Search Results area. (see **Screenshot 11**).

Search Results area

Click on the name of the donor to update information

ID	Full Name	Record Date	Address	City, ST, Zip	Employer Name
76852	JANE JONES	Current	789 BLACKSTONE BLVD	PROVIDENCE, RI 02906	ANCHOR BANK
76859	MRS. LISA K. JONES	Current	123 SUDURDAN ST	PROVIDENCE, RI 02906	WATERVIEW RESTAURANT

Screenshot 10 – Search Results for Individual donor

Search Result area

Click on the name of the donor to update information

Donor/Payee Update

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v 1.5.4 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name:
 Address1:
 Address2:
 City: State: Zip:

[Search](#) [Contribution Home](#)

Search Results [Close](#)

ID	Full Name	Record Date	Address	City, ST, Zip	Employer Name
76854	BLACKSTONE BANK	Current	789 FINANCIAL WAY	PROVIDENCE, RI 02903	
76886	BANK ONE	Current			

Screenshot 11-Search results for Organization payee

- Click on the name of the individual donor or organization payee to update/fix.
- Update the individual donor's (see **Screenshot 12**) or organization payee's (see **Screenshot 12.1**) information.

Update Personal and/or Employer Information

Click Fix to save changes

Donor/Payee Update

Welcome back: JOHN Q CANDIDATE Last Login: Apr 19 2005 12:57PM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Record Type: ☒ Individual ☐ Organization

Personal Information

Change Data:
 Prefix: First Name: MI: Last Name: Suffix:
 Address1:
 Address2:
 City: State: Zip:

Employer Information

Employer Name:
 Employer Address1:
 Employer Address2:
 Employer City: State: Employer Zip:

[Fix](#) [New Search](#) [Contribution Home](#)

Organization Change History

Change Date	Full Name	Address	City, ST, Zip
Current	MRS. J. R. A. V. JONES	123 SUBURBAN ST	PROVIDENCE, RI 02906

Screenshot 12 – Update Individual Donor Information

https://secure2.ricampaignfinance.com/RhodeIslandCF/Candidate/DonorUpdate.aspx?Page=Contributio - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://secure2.ricampaignfinance.com/RhodeIslandCF/Candidate/DonorUpdate.aspx?Page=Contribution

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v 1.5.4 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name: BANK ONE

Address1: [Text Box]

Address2: [Text Box]

City: [Text Box] State: [Text Box] Zip: [Text Box]

Fix Click Fix to save changes **New Search** **Contribution Home**

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Update Organization Information

Click Fix to save changes

Screenshot-12.1-Update Organization Payee Information

7. Click **Fix** at the bottom-left of the screen to save any changes. (Note: you will be returned to the Contribution Administration page.)

Add a Contribution-Political Action Committee (PAC) or Political Party Committee

When adding a contribution from a PAC or Party:

1. Go to the Contribution Administration page located under the Contributions tab.
2. Click on the Add button in the Contribution History area.
3. Select Contribution Type = PAC or Party from the drop down list located in the Contribution area of the Contribution Entry page. The page will automatically refresh, bringing the user to the correct data entry screen.
4. Enter complete contribution information.
5. In the Donor Information area, enter the name of the PAC or Party or a Key #, if known.
6. Click on the Search button. (see **Screenshot 13**)

Note: The correct names and addresses of all PACs and Parties registered in RI are stored in ERTS. Entering the PAC or Party name incorrectly will yield no results from the search. If the user has difficulty locating a PAC or Party stored in ERTS, enter only the first word in the PAC's or Party's name, or a portion thereof, or use the symbol "%" as a wildcard before or after a word contained in the PAC or Party name.

7. Click on the appropriate PAC name from the search results. (see **Screenshot 13**)
8. Click on the Submit button to save the entry in ERTS.

Contribution Entry

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v1.5.4 (stage)

Contribution

Contribution Type * Receipt Date (mm/dd/yyyy) * Deposit Date (mm/dd/yyyy) * Transaction Type * Contribution Amount * * Required ** Recommended

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- [Change Pin](#)

Donor Information

PAC Name * Key

Key	Organization Name	Address	City, State, Zip
278	RI DENTAL PAC	200 CENTERVILLE ROAD	WARWICK, RI 02886

From the search results, click on the name of the appropriate donor PAC

Screenshot 13-Contribution Entry page for a PAC

Contribution Entry

Welcome back: Richard E Thornton on behalf of JOHN O CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v 1.5.4 (stage)

Contribution

Contribution Type * Receipt Date (mm/dd/yyyy) * Deposit Date (mm/dd/yyyy) Transaction Type * Contribution Amount *

PAC 03/03/2005 03/03/2005 Check \$ 250

Contribution Explanation

Donor Information

PAC Name * RI DENTAL PAC

Submit **Return**

Click Submit button to save entry into ERTS

Screenshot 13.1-Submit registered PAC/Party contribution

9. Click on the Submit button to save the entry in ERTS. (see **Screenshot 13.1**)
10. If the search for a PAC or Party name ultimately yields no results, complete all appropriate fields in the Donor Information area and click the [Add as new PAC/Party](#) link. (see **Screenshot 14**)
11. Click on the Submit button to save the entry in ERTS. (see **Screenshot 14.1**)

Note: Accepting a contribution from a PAC or Party not registered in RI is not allowed under RI campaign finance law. Generally speaking, if the user adds a new PAC or Party, either the original search was not comprehensive enough, or a contribution was received from an illegal source and must be returned to the donor.

Contribution Entry

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v1.5.4 (stage)

Contribution *: Required **: Recommended

Contribution Type *: PAC Receipt Date (mm/dd/yyyy): 03/03/2005 Deposit Date (mm/dd/yyyy): 03/03/2005 Transaction Type *: Check Contribution Amount *: \$ 200

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Donor Information

PAC Name *: RESTAURANT OWNERS Key:

Address1: **:

Address2:

City: **: State: **: Zip:

Sorry, there were no matches to the criteria you provided

[Add as new PAC/Party](#)

Annotations:

- No results returned on search
- Click on "Add as new PAC/Party"
- Enter complete Donor Information

Screenshot 14-Add as new PAC/Party

Candidate Contribution - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://secure2.ricampaignfinance.com/RhodeIslandCF/Candidate/contribution.aspx

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Contribution Entry

Welcome back: Richard E Thornton on behalf of JOHN Q CANDIDATE Last Login: Sep 15 2005 9:41AM
[Help with this page](#) [My BOE Homepage](#) [Log Off](#) | v1.5.4 (stage)

Contribution

* Required
** Recommended

Contribution Type * Receipt Date (mm/dd/yyyy) * Deposit Date (mm/dd/yyyy) Transaction Type * Contribution Amount *

PAC Check \$

Contribution Explanation

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- [Campaign Finance Home](#)
- [Forms](#)
- [Change Pin](#)

Donor Information

PAC Name * RESTAURANT OWNERS
Address1: ** 200 OAK DRIVE
Address2:
City: ** PROVIDENCE State: ** RI Zip: 02903

Click Submit to save entry in ERTS

Submit Return

Done start LetterTracking.xls GroupWise - Mailbox ERTS User Manual Dr... Candidate Contributi... Internet 2:41 PM

Screenshot 14.1-Submit new PAC/Party

Find a Contribution

A user may need to find a contribution previously entered into ERTS to:

- ◆ Update entry
- ◆ Delete entry
- ◆ Return funds to the contributor
- ◆ Record contribution as unavailable due to Non-Sufficient Funds (NSF).

Searching ERTS for a contribution is done from the Contributions Administration page (see Fig. 15). Click on the *Find* button to access the *Contribution Update* page (see Fig 13).

Contribution Administration Page

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Contribution Administration

Welcome back: JOHN Q CANDIDATE Last Login: Apr 22 2005 8:33AM
[Help with this page](#) [Log Off](#) (v 1.5.2 (stage))

Overview **Contributions** Expenditures Filings Reports Admin

Contribution History (10 most recent Contributions)

Donor	Contribution Type	Contribution Date	Deposit Date	Contribution Amount	
MS. LISA K JONES	Individual	03/15/2005		\$300.00	edit
JOHN Q CANDIDATE	Loan Proceeds	02/15/2005		\$500.00	edit
	Aggregate - Individual	03/07/2005	03/07/2005	\$370.00	edit
JANE JONES	Individual	02/19/2005		\$125.00	edit
MR. JOHN N. SMITH	Individual	01/12/2005		\$50.00	edit

Donor Maintenance

By entering the Donor Maintenance area, you as the user will have the ability to search for a donor and to fix any information that is stored about the selected donor.

[Update a Donor](#)

Click Find to search for a contribution

Figure 15- Contribution Administration

At the *Contributions Update* page, enter in the as much information about the contribution as you know. For example, enter in the last name of the donor and/or the contribution amount (see Fig. 16).

Contribution Update screen

Contribution Update

Welcome back: JOHN Q CANDIDATE Last Login: Apr 22 2005 8:33AM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Contribution

Contribution Type	Receipt Date *	Deposit Date	Transaction Type *	Contribution Amount *
Please Select			All	\$ 50.00

Contribution Explanation:

Transaction Number:

Donor Information

Prefix:	First Name:	MI:	Last Name:	Suffix:
			SMITH	
Address1: <input type="text"/>				
Address2: <input type="text"/>				
City: <input type="text"/>		State: <input type="text"/>	Zip: <input type="text"/>	

Employer Information

Name: <input type="text"/>				
Address1: <input type="text"/>				
Address2: <input type="text"/>				
City: <input type="text"/>		State: <input type="text"/>	Zip: <input type="text"/>	

Click Find Contribution to search

Find Contribution **Return**

Enter in as much information about the Contribution as you know. For example, Last Name & Amount

Fig. 16 – Contribution Update page

The results for the search will appear at the top of the page (see Fig. 17). If no results are displayed, try broadening your search by including less information, such as only the Last Name. If the search yields results, click on one of the options shown to the right of the contribution.

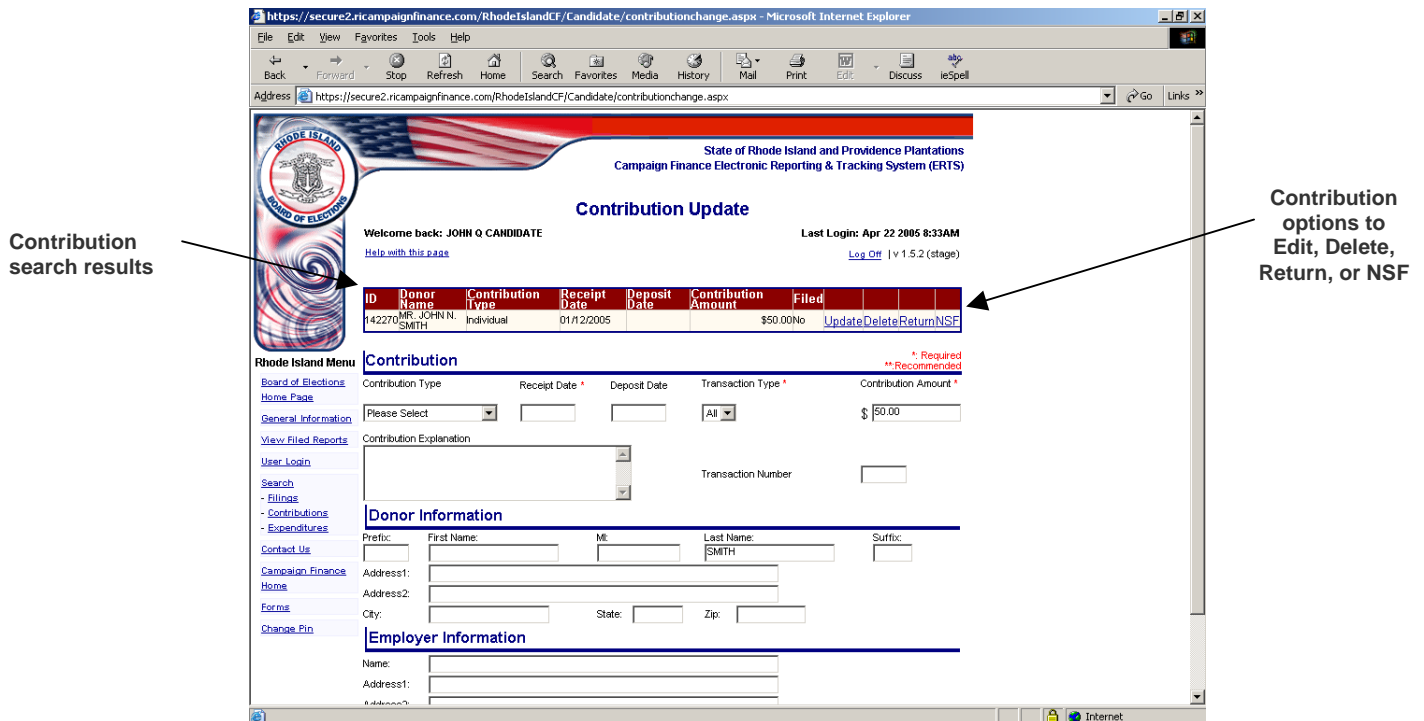


Fig. 17 – Contribution search results

The options displayed are:

- **Update:** Allows you to change details for the contribution.
- **Delete:** Delete the contribution from ERTS.
- **Return:** Used if you returned a contribution to a donor
- **NSF:** Used when a contribution is returned for insufficient funds

Updating a Contribution (See Fig. 18)

If you choose to update a contribution you searched for, click the *Update* link to be taken to the *Contribution Update* page. Change any details of the contribution which need to be changed. The only detail you **cannot** change is the Contribution Type. Once you are finished, click *Update Contribution*.

The screenshot displays the 'Contribution Update' page within the ERTS interface. The page header includes the state seal and the system name. A sidebar on the left contains a 'Rhode Island Menu' with links to various sections. The main form area is titled 'Contribution Update' and contains the following fields and sections:

- Contribution Section:** Includes 'Contribution Type' (dropdown), 'Receipt Date' (1/12/2005), 'Deposit Date' (empty), 'Transaction Type' (Check), and 'Contribution Amount' (\$50.00). A red asterisk indicates that the Contribution Amount is a required field.
- Donor Information Section:** Includes fields for Prefix (MR), First Name (JOHN), Last Name (SMITH), Address1 (22 SOUTH MAIN ST), Address2 (empty), City (PROVIDENCE), State (RI), and Zip (02904).
- Employer Information Section:** Includes fields for Name (HARBAGANSETT PRINTING), Address1 (458 CENTRAL AVE), Address2 (empty), City (PROVIDENCE), State (RI), and Zip (02908).

Annotations on the image include:

- An arrow pointing to the 'Contribution Update' title.
- An arrow pointing to the 'Update Contribution' button at the bottom.
- An arrow pointing to the 'Contribution Amount' field.

Fig. 18 – Updating a Contribution page

Deleting a Contribution

If you need to delete a contribution you searched for, click the “Delete” link (see Fig. 17) and a modified version of the *Update Contribution* page will display. A confirmation message asking if you wish to delete the contribution will display at the top-left of the screen. Click “Yes” delete the contribution or “No” to cancel.

Returning a Contribution

In the event you need to return a contribution to a contributor, search for the contribution and click the “Return” link, which will bring up the *Return Contribution* page (see Fig. 19). Enter in the amount you are returning to the donor and complete any of the additional fields as needed. Click the “Return Contribution” button to submit the data to ERTS.

Fig. 19 – Return a Contribution page

Non-Sufficient Funds (NFS)

If a donor made a contribution to you with a check and the check was returned by the bank due to Non-Sufficient Funds (NFS), search for the contribution and click the *NFS* link to bring up the *NSF Check* page. Enter the date the check was returned and provide a brief explanation. Click the *Continue NSF* button to submit the change to ERTS.

Expenditures

Clicking on the **Expenditures** tab will bring you to the Expenditures section of ERTS. This is where you can enter and manage all the expenditures of your organization.

Expenditure Administration

Welcome back: JOHN Q CANDIDATE Last Login: Apr 26 2005 7:22AM
[Link with this page](#) [Log Off](#) | v 1.5.2 (stage)

Overview Contributions **Expenditures** Filings Reports Admin

Expenditure History (10 most recent Expenditures)

Payee	Expenditure Type	Expenditure Date	Payment Date	Expenditure Amount
JOHN Q CANDIDATE	Repayment of Loan	03/22/2005		\$250.00 Edit
RENAISSANCE CATERING	AP Repayment	03/01/2005	03/01/2005	\$200.00 Edit
RENAISSANCE CATERING	Account Payable	02/05/2005		\$200.00 Edit
	Aggregate Expenditure	03/25/2005		\$87.50 Edit
GOOD PIZZA CO.	Campaign Expenditure	03/03/2005		\$150.00 Edit
BLACKSTONE BANK	Campaign Expenditure	02/27/2005		\$8.75 Edit
A&L PRINTING INC	Campaign Expenditure	02/25/2005		\$78.52 Edit

Payee Maintenance

By entering the Payee Maintenance area, you as the user will have the ability to search for a Payee and to fix any information that is stored about the selected Payee.

[Update a Payee](#)

Fig. 20 – Expenditure Administration page

Expenditures History Section (see Fig. 20)

This section allows you to view the last 10 expenditures entered into ERTS. The following detail is provided for each of the contributions:

- **Payee:** The payee for the expenditure
- **Expenditure Type:** This is the type of expenditure.
- **Expenditure Date:** This is the date the expenditure was incurred. This date will be the same as the Payment Date for expenditure types not requiring an expenditure date.
- **Payment Date:** This is the date the expenditure was paid.
- **Contribution Amount:** The amount of the expenditure.

Adding a New Expenditure (see Fig. 21)

In order to add a new expenditure in ERTS, you must click the **Add** button in the Expenditure History section (see Fig. 20). The *Expenditure Entry* page will then appear (see Fig 21). The Expenditure Entry page has two sections that must be completed. You should always select an *Expenditure Type* from the scroll box. This is important since the required fields on the page will change depending on the *Expenditure Type* selected (see Expenditure Type below for additional explanation). The following sections are found on the *Expenditure Entry* page:

- **Expenditure:** Specific Information about the expenditure being added
- **Payee Information:** Required information about the payee to whom the expenditure was paid.

Fig. 21 – Entering an Expenditure

Disbursement Type (see Fig. 21)

Before entering any information for a new expenditure, you must select a *Dispersion Type* from the first scroll box at the upper-left of the *Expenditure Entry* page. The following disbursement types are available for you to select:

- Campaign Expenditure:
- Aggregate Expenditure
- Repayment of Loan
- Refund Contribution
- Account Payable
- AP Repayment

Once you select an expenditure type, the page will reload to reflect the relevant and required fields for that particular expenditure type. Once you have selected an expenditure type, you may then enter data into the rest of the fields on the page.



If you leave a **required** field blank, the contribution will not be accepted. You will receive a warning message in red text indicating which required fields you failed to enter information into.

Searching for a Payee (see Fig. 20)

Once you have entered a payee and the associated expenditure into ERTS, you do not need to retype the payee's information if there is another expenditure to them from your organization. Simply select the *Expenditure Type* and enter the required details regarding the expenditure. Type the Payee's last name or organization name into the appropriate field in the Payee Information section, then click Search. A list of possible matching payees will appear below the fields. Select the correct payee to which the expenditure was made and the Payee Information will automatically be loaded into all the appropriate fields. Verify all the information for the payee and expenditure are correct and click *Submit* to save the expenditure in ERTS.

It is important that you utilize the "Search" feature whenever you are adding expenditures. This will allow ERTS to store each of your payees in its database. If you frequently have expenditures to the same payee, this will make it easier as you will not have to enter that payee's information each time.

If you fail to use the Search feature, you more than likely continue creating duplicate payee records for the same individual or organization, which will be problematic if you ever need to update the payee's contact information in the database using the Payee Maintenance section since you will have multiple entries to change for the same payee.

Payee Maintenance Section (see Fig. 20)

If a previous payee has new contact information and you are making another expenditure to the payee, do not add a new expenditure to the payee until you have updated their entry in the database. In the *Payee Maintenance Section* (see Fig 20.), click on *Update a Payee* and you will be taken to the *Donor/Payee Update* page (see Fig. 22)

https://secure2.ricampaignfinance.com/rhodeIsland/Candidate/DonorUpdate.aspx?Page=Expenditure - Microsoft Internet Explorer

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: Apr 29 2005 1:41PM
[Log Off](#) | v 1.5.2 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name:
 Address1:
 Address2:
 City: State: Zip:

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Fig. 22 – Donor/Payee Update page

Once you arrive at the Donor/Payee Update page, select whether the payee is an individual or an organization and the fields on the page will change accordingly. Then enter the payee's last name into the Last Name field or enter the name of the organization if relevant, and click *Search*. ERTS will search the database for all payees with the last name or organization name you specified. All matches will be displayed at the bottom of the page. Click the name of the payee you wish to update. (See Fig. 22.1)

https://secure2.ricampaignfinance.com/rhodeIsland/Candidate/DonorUpdate.aspx?Page=Expenditure - Microsoft Internet Explorer

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: Apr 29 2005 1:41PM
[Log Off](#) | v 1.5.2 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name:
 Address1:
 Address2:
 City: State: Zip:

Search Results

ID	Full Name	Record Date	Address	City	State	Zip	Employer Name
79695	GOOD PIZZA CO.	Current	123 PARK AVE	CRANSTON	RI	02910	

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Fig. 22.1 – Payee update search results

https://secure2.ricampaignfinance.com/rhodeIsland/Candidate/DonorUpdate.aspx?Page=Expenditure - Microsoft Internet Explorer

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Donor/Payee Update

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: Apr 29 2005 1:41PM
[Log Off](#) | v 1.5.2 (stage)

Record Type: ☐ Individual ☒ Organization

Personal Information

Organization Name:
 Address1:
 Address2:
 City: State: Zip:

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Fig. 22.2 – Edit payee information
MARCH 2006

Once you have updated the payee's information, click *Fix* at the bottom-left of the screen to save the changes. (See **Fig. 22.2**) You will then be returned to the *Expenditures Administration* page.

Searching for an Expenditure (See Fig. 23)

There are times when you may need to search for a specific expenditure to a particular payee. Searching ERTS for an expenditure is done within the *Expenditures Administration* section (see Fig. 20). Click on the *Find* button to access the *Expenditure Update* page (see Fig. 23).

At the *Expenditures Update* page, enter in the as much information about the expenditure as you know. For example, enter in the name of the payee (see Fig. 23).

The results for the search will appear at the top of the page (see Fig. 24). If no results are displayed, try broadening your search by including less information. If the search yields results, click on one of the options shown to the right of the contribution.

ExpenditureChange - Microsoft Internet Explorer

Address: https://secure2.ri.campaignfinance.com/rhodeisland/candidate/ExpenditureWorkPage.aspx

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Expenditure Update

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: Apr 29 2005 1:41PM
[Log Off](#) | v 1.5.2 (stage)

Expenditure

Disbursement Type *
Please Select

Expenditure Type *
All

Expenditure Amount *
\$ 150.00

Valid MPF Expenditure

Expenditure Explanation

Expenditure Date (mm/dd/yyyy) *

Check/Pymt Date (mm/dd/yyyy) *

Ref. Check Number

Payee Information

☒ Individual ☐ Organization

Prefix First Name MI Last Name Suffix

Address1

Address2

City State Zip

Find Expenditure **Return**

Then click 'Find Expenditure'

Enter in a known detail about the expenditure such as the amount

Fig. 23 – Expenditure Update page

ExpenditureChange - Microsoft Internet Explorer

Address: https://secure2.ri.campaignfinance.com/rhodeisland/candidate/ExpenditureChange.aspx

State of Rhode Island and Providence Plantations
Campaign Finance Electronic Reporting & Tracking System (ERTS)

Expenditure Update

Welcome back: JOHN Q CANDIDATE
[Help with this page](#)

Last Login: Apr 29 2005 1:41PM
[Log Off](#) | v 1.5.2 (stage)

Search Results

Payee Name	Expenditure Type	Expenditure Date	Payment Date	Amount	Filed	
GOOD PIZZA CO Food, Beverages and Meals	0303/2005			\$150.00	No	Update Delete

Expenditure

Disbursement Type *
Please Select

Expenditure Type *
All

Expenditure Amount *
\$ 150.00

Valid MPF Expenditure

Expenditure Explanation

Expenditure Date (mm/dd/yyyy) *

Check/Pymt Date (mm/dd/yyyy) *

Ref. Check Number

Payee Information

☒ Individual ☐ Organization

Prefix First Name MI Last Name Suffix

Address1

Address2

City State Zip

Find Expenditure **Return**

Search results will be listed above

Choose whether to Update the expenditure or Delete it

Fig. 24 – Expenditure search results

Updating an Expenditure (See Fig. 25)

If you choose to update an expenditure you searched for, click the “*Update*” link to be taken to the *Expenditure Update* page. Change any details of the expenditure that need to be changed. The only detail you **cannot** change is the *Disbursement Type*. Once you are finished, click “*Update Expenditure*”.

Expenditure Update page

Click “Update Expenditure” to submit the updated expenditure to ERTS

Update the expenditure details

Verify the payee information is accurate

Fig. 25 – Expenditure Update page

Deleting an Expenditure

If you need to delete an expenditure you searched for, click the “*Delete* link” (see Fig. 24) and a modified version of the *Update Expenditure* page will display. A confirmation message asking if you wish to delete the expenditure will display at the top-left of the screen. Click “Yes” to delete the expenditure, or click “No” to cancel. (See Fig. 26)

Expenditure Update

Welcome back: JOHN Q CANDIDATE Last Login: Apr 29 2005 1:41PM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Are you sure you want to delete Record 13518.

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Expenditure

Disbursement Type * Expenditure Type * Expenditure Amount * Valid MPF Expenditure **Recommended

Expenditure Explanation Expenditure Date (mm/dd/yyyy) * Check/Pymt Date (mm/dd/yyyy) *

Ref./Check Number

Payee Information

☒ Individual ☐ Organization

Prefix First Name MI Last Name Suffix

Address1

Address2

City State Zip

Fig. 26 – Delete expenditure confirmation

Filing Reports

Clicking on the **Filings** tab in the *Organization Overview* page will bring you to the Filings page where the Treasurer of the organization may submit filings to the Board of Elections and review filings already submitted.

Filing Administration

Welcome back: JOHN Q CANDIDATE
[Help with this page](#) Last Login: May 2 2005 9:36AM
[Log Off](#) | v 1.5.2 (stage)

Overview Contributions Expenditures **Filings** Reports Admin

Filing History

Report Type	Due Date	Report Status	Date Filed	
Notice of Organization - (CF-1)		Received by BOE	Apr 14 2005 7:58AM	View
2004 On-Going Quarterly (4th)	01/30/2005	Received by BOE	Jan 30 2005 2:16PM	View
2004 28 Days After Election	11/30/2004	Received by BOE	Dec 12 2004 9:03AM	View
2004 7 Days Before Election	10/26/2004	Received by BOE	Oct 25 2004 8:34AM	View
2004 28 Days Before Election	10/05/2004	Received by BOE	Oct 7 2004 3:09PM	View
2004 On-Going Quarterly (2nd)	07/30/2004	Received by BOE	Jul 30 2004 12:12PM	View
2004 On-Going Quarterly (1st)	04/30/2004	Received by BOE	Apr 29 2004 11:12AM	View

Reports Due

Report Type	Due Date	Report Status	Date Filed	
2005 On-Going Quarterly (1st)	04/30/2005	Past Due		File
2005 On-Going Quarterly (2nd)	07/30/2005			File
2005 On-Going Quarterly (3rd)	10/30/2005			File
2005 On-Going Quarterly (4th)	01/30/2006			File

Submit a Non-Scheduled Filing

[CF - 1: Notice of Organization](#)
[CF - 5: Affidavit for Annual Filing Exemption](#)
[CF - 6: Affidavit for Certain Exemptions](#)
[CF - 7: Affidavit Campaign Finance Status](#)

Fig. 27 – Filing Administration section

Filing History Area (see Fig. 27)

The Filing History area contains all the filings submitted to the Board of Elections. You can view both the electronic and scanned original (if any) version of the filing.

- **Report Type:** This is the report which is due to be filed soon.
- **Due Date:** The date the report must be filed through ERTS.
- **Report Status:** Will indicate whether the form is filed or un-filed.
- **Date Filed:** Indicates date the report was filed.
- **View:** Click to view the report

Reports Due Area (see Fig. 27)

The Reports Due area allows you to easily see the status of various report types. The report status column will indicate whether the report is past due. This area omits the "View" and "Amend" links and displays:

- **File:** Click to electronically file the report through ERTS.

Non-Scheduled Filing Area (see Fig. 27)

The Non-Scheduled Filing area contains all the filings that may be submitted to the Board of Elections. You may choose one of the listed forms to file if they are not on your filing schedule on the *Organization Overview Page*



Do not submit a filing from the Filing Reports section if it is on your filing schedule. Doing so may cause ERTS to incorrectly determine that you are late in filing a report.

Filing Reports (see Fig. 28)

Once you are ready to file a **report which is on your filing schedule**, click the “File” link next to the report you wish to file. (See Fig. 27) You will be taken to the CF-2 Summary of Campaign Activity screen (Fig. 28).

Summary of Campaign Activity

Welcome back: JOHN Q CANDIDATE Last Login: May 4 2005 2:11PM
[Help with this page](#) [Log Off](#) | V 1.5.2 (stage)

CF-2 Summary of Campaign Activity

Candidate: JOHN Q CANDIDATE Office Running For: City/Town Council

Treasurer:	Full Name JOHN Q CANDIDATE	Key # 6060	Type of Report 2005 On-Going Quarterly (1st)
	Address 100 ELM STREET ANYTOWN, RI 00000		<input type="button" value="Refresh"/>
	Reporting Period 01/01/2005 - 03/31/2005	Phone (401) 555-1212	
	Office Being Sought City/Town Council		

REPORT OF CASH TRANSACTIONS

1. BEGINNING CASH BALANCE	\$0.00
2. CASH RECEIPTS	
a. CONTRIBUTIONS FROM:	
1. Aggregate	370.00
a. (Individuals)	370.00
b. (Political Parties)	0.00
c. (Political Action Committees)	0.00
2. Individuals	475.00

REPORT OF CAMPAIGN FUND STATUS

7. CASH	\$570.23
8. OTHER ASSETS:	

Fig. 28 – CF-2 Summary of Campaign Activity Upper Screen

Once the CF-2 Summary of Campaign Activity screen appears, verify the Candidate, Treasurer or Organization name and contact information are correct.

Assets:

7. CASH	\$570.23
8. OTHER ASSETS:	
9. TOTAL ASSETS:	\$570.23

Liabilities and Fund Balance:

10. LIABILITIES	
a. ACCOUNTS PAYABLE:	\$0.00
b. LOANS PAYABLE:	250.00
c. OTHER LIABILITIES:	
11. TOTAL LIABILITIES	250.00
12. TOTAL FUND BALANCE	\$320.23
13. TOTAL LIABILITIES/ FUND BALANCE	\$570.23

Summary:

3. TOTAL CASH AVAILABLE	1,345.00
4. CASH DISBURSEMENTS	
A. AGGREGATE EXPENSES	87.50
B. CAMPAIGN EXPENSES	237.27
C. REPAYMENT OF LOANS	250.00
D. ACCT PAYABLE REPAYMENTS	200.00
E. OTHER	0.00
F. OTHER DISBURSEMENTS	
5. ENDING CASH BALANCE	\$570.23

REPORT OF IN-KIND CONTRIBUTIONS

6. TOTAL VALUE OF IN-KIND CONTRIBUTIONS	0.00
---	------

Buttons: Re-Calculate, File, View CF-3, View CF-4, Cancel

Fig. 28.1 – CF-2 Summary of Campaign Activity Lower Screen

Once you have verified that all of the fields on the Summary of Campaign Activity are accurate, click “File” to submit the report to ERTS. (See Fig. 28.1) Once you click “File”, a confirmation dialog box will appear asking you if you are sure you want to file the report (see Fig. 29). Click OK to submit the report, or click “Cancel” to return to the CF-2 Summary of Campaign Activity screen without filing the report.

REPORT OF CASH TRANSACTIONS

1. BEGINNING CASH BALANCE	\$0.00
2. CASH RECEIPTS	
a. CONTRIBUTIONS FROM:	
1. Aggregate	370.00
a. (Individuals)	370.00
b. (Political Parties)	0.00
c. (Political Action Committees)	0.00
2. Individuals	475.00
3. Political Parties	0.00
4. Political Action Committees	0.00
5. Loan Proceeds	500.00
6. Payroll Check Off	0.00
7. Interest	0.00
8. State Check Off	0.00
9. Refund/Rebate	0.00
10. Party Building	0.00
11. Matching Public Funds	0.00
12. Other	0.00
13. Returned Contributions	0.00
14. Returned Checks	0.00
b. OTHER RECEIPTS:	
3. TOTAL CASH AVAILABLE	1,345.00
4. CASH DISBURSEMENTS	
A. AGGREGATE EXPENSES	87.50
B. CAMPAIGN EXPENSES	237.27
C. REPAYMENT OF LOANS	250.00
D. ACCT PAYABLE REPAYMENTS	200.00
E. OTHER	0.00
F. OTHER DISBURSEMENTS	

REPORT OF CAMPAIGN FUND STATUS

7. CASH	\$570.23
8. OTHER ASSETS:	
9. TOTAL ASSETS:	\$570.23
10. LIABILITIES	
a. ACCOUNTS PAYABLE:	\$0.00
b. LOANS PAYABLE:	250.00
c. OTHER LIABILITIES:	
11. TOTAL LIABILITIES	250.00
12. TOTAL FUND BALANCE	\$320.23
13. TOTAL LIABILITIES/ FUND BALANCE	\$570.23

Buttons: Re-Calculate, File, View CF-3

Confirmation Dialog Box: Do you really want to FILE this report? (OK, Cancel)

Fig 29 – Confirmation dialog box

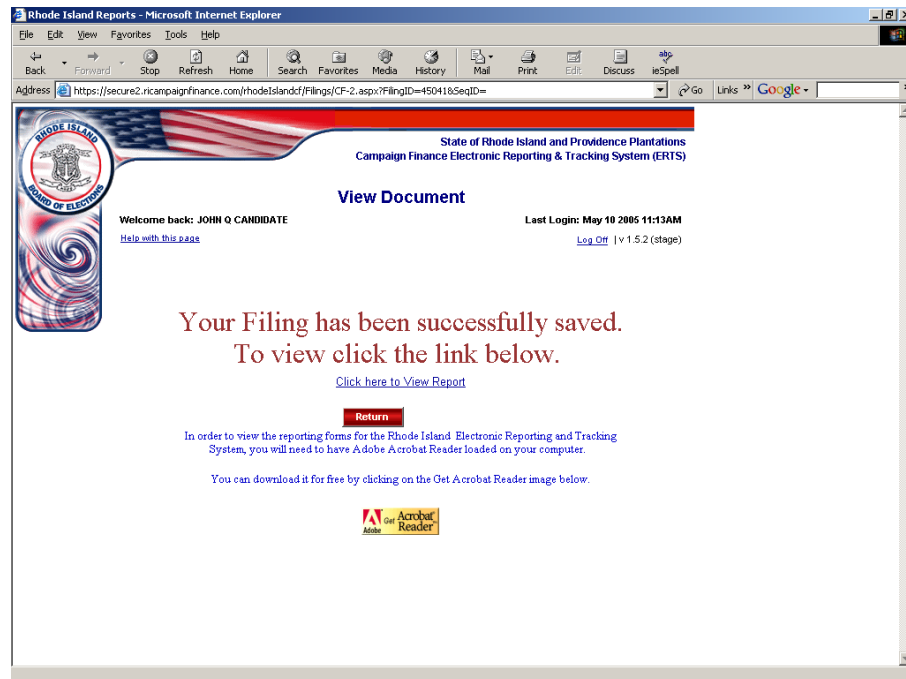


Fig. 30 – Filing confirmation screen

Once ERTS has successfully saved your report, you will see a filing confirmation screen. (See Fig. 30) You click “*Click here to View Report*” if you wish to view your report as you filed it with ERTS. It is recommended you print this screen for your records.

Amending Filed Reports (see Fig. 31)

If you need to amend a report you have already filed, you may submit an amended report to the Board of Elections through ERTS. To submit an amended report, click on the “*Filings*” tab to get to the *Filing Administration* page (see Fig. 31). Under the Filing History area of the page, locate the report you wish to amend and click the *Amend* link next to the report.

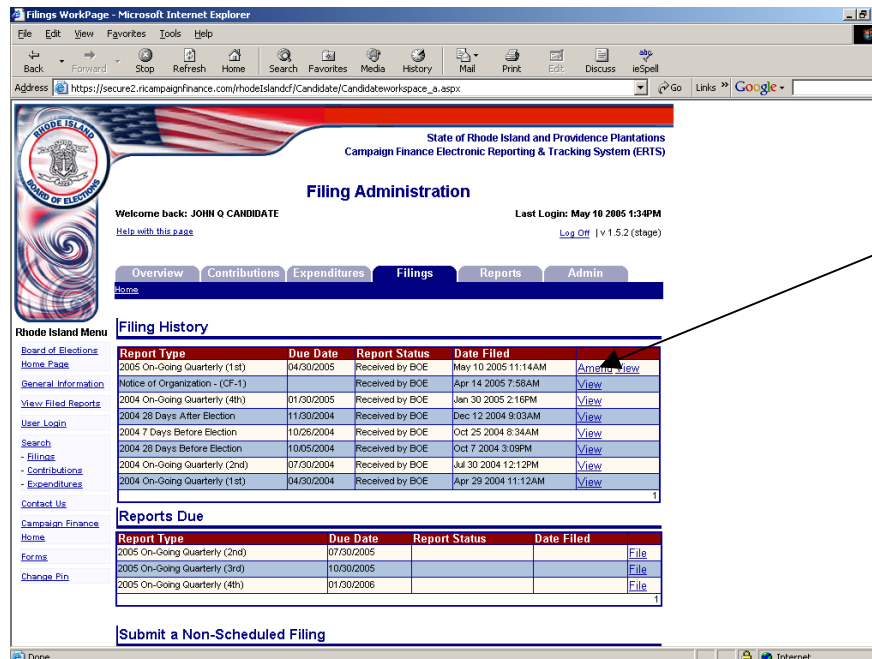


Fig. 31 – Amending a report through the Filing Administration page

Once you click the “*Amend*” link, you be taken to the summary of campaign activity screen, as you were when you initially filed the report. Verify the changes you have made are incorporated into the amended filing and click “*File*” to submit the report to the Board of Elections through ERTS.

A confirmation screen will appear asking you to confirm you wish to file the report. Click “*OK*” to submit the amended filing, or click cancel to not submit the filing. If you click “*OK*” to file the report, a confirmation screen will appear informing you that your report has been filed. It is recommended you print this report for your records.

Creating Activity Reports

Through ERTS, you have the capability to view and print activity reports for your organization. Activity can include any of the following items:

- Contributions
- Expenditures
- Loan Status
- Account Payable Status
- AP Repayment Status

The report can be customized according to a variety of criteria including: election cycle, date range, contribution type, donor last name, organization name, amount, filing status, and contribution status. Additionally, you can choose to create a summary report or a detailed report.

To create a report for your organization, click on the “*Reports*” tab on the Navigation Bar. This will take you to the *Organization Reports* screen (Fig. 32). Select the criteria on which you wish to base the report.

Rhode Island Board of Elections - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print Edit Discuss ieSpell

Address <https://secure2.ricampaignfinance.com/RhodeIslandCF/Candidate/Reports/ReportWorkPage.aspx> Go Links >> Google

Organization Reports

Welcome back: JOHN Q CANDIDATE Last Login: May 10 2005 1:35PM
[Help with this page](#) [Log Off](#) | v 1.5.2 (stage)

Overview Contributions Expenditures Filings **Reports** Admin

Reports

I want to view: Contributions

Select report criteria:

Election Cycle: 2005 Election

Date From: 01/01/2005 Thru: 12/31/2005

Contribution Type: All

Donor Last Name or Organization Name: First Name:

City: State: Zip Code:

At Least Amount:

Filing Status: ☒ All ☐ Filed ☐ Un-filed

Contribution Status: ☒ All ☐ Complete ☐ Incomplete

Report Type: ☒ Summary ☐ Detail

Sum Report By: Contribution Type

Sort instructions:

Fig. 32 – Organization Reports upper screen

Fig. 33 - Organization Reports lower screen

Click “View/Print” Report and ERTS will display your report onscreen (Fig. 33). The report is formatted to be easily printed. To print the report, use your browser’s print function by going to File>Print within your browser, or export detail to comma delimited file. Click on Return to go back to the criteria selection page for another report. (See Fig. 34)

Rhode Island Board of Elections
Campaign Finance Electronic Reporting & Tracking System (ERTS)
JOHN Q CANDIDATE
Contribution Report
01/01/2005 - 12/31/2005

Summary Totals Results per page: 10

Summary Groupings	Total
Individual	\$775.00
Aggregate - Individual	\$370.00
Loan Proceeds	\$500.00
Repayment of Loan	(\$250.00)

Contributions (Export Detail to comma delimited file) Results per page: 15

Donor	Employer	Type	Amount	Receipt Date	Deposit Date	ShowDetails...
CANDIDATE, JOHN Q		Repayment of Loan	(\$250.00)	03/22/2005		ShowDetails...
SMITH, MR. JOHN N.	NARRAGANSETT PRINTING	Individual	\$50.00	01/12/2005		ShowDetails...
JONES, JANE	ANCHOR BANK	Individual	\$125.00	02/19/2005		ShowDetails...
		Aggregate - Individual	\$370.00	03/07/2005	03/07/2005	ShowDetails...
CANDIDATE, JOHN Q	JOHN Q SMITH LAW OFFICES	Loan Proceeds	\$500.00	02/15/2005		ShowDetails...
JONES, MS. LISA K	WATERVIEW RESTAURANT	Individual	\$300.00	03/15/2005		ShowDetails...
WILLIAMS, ROGER	WILLIAMS & WILLIAMS ESQ	Individual	\$300.00	02/01/2005		ShowDetails...

Fig. 34 - Report

Administrative Functions

ERTS allows you to customize some settings in order to make entering data easier and less time-consuming. This is done on the *Organization Administration* page, which you can access by clicking on the “Admin” tab on the *Navigation Bar*. Once at the *Organization Administration* page (Fig 35.), you will see several features and sections of importance.

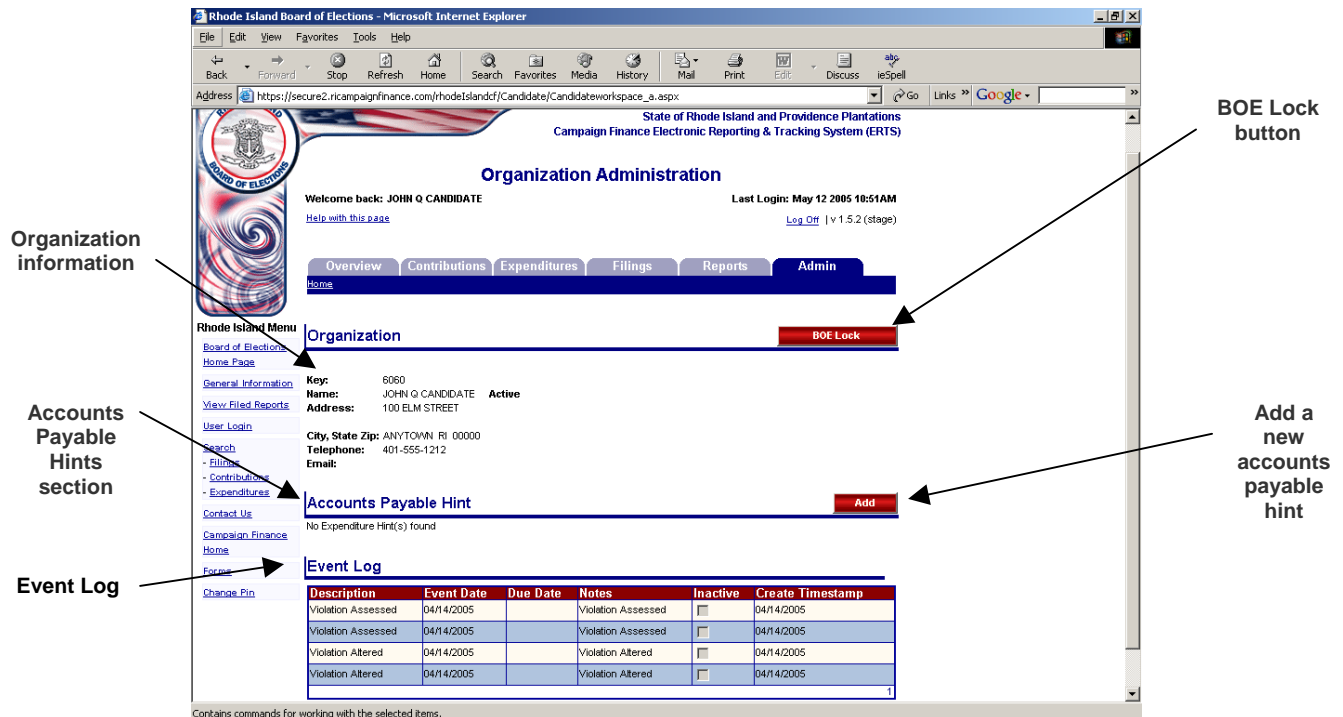


Fig. 35 – Organization Administration screen

BOE Lock button (see Fig. 35)

By default, ERTS prevents the Board of Elections from accessing your organization's data. You have the option to grant the Board of Elections permission to access your data so that they can assist you in entering data or submitting filings.

Organization (see Fig. 35)

This area contains the contact information for your organization. It also lists your key number. If any of the information is incorrect, please contact the Board of Elections immediately. If you wish to add or change any of the contact information, you will need to submit form CF-1.

Accounts Payable Hint (see Fig. 35)

ERTS enables you to use *Accounts Payable Hints* for accounts payable (AP) expenditures to assist matching charges to a repayment of those charges (AP Repayment expenditure). To add a new account payable hint, click the “Add” button in the *Accounts Payable Hint* section.